إتحـــاد إذاعـــات الدول العربيـــة

ARAB MEDIA LANDSCAPE

CHALLENGES AND OPPORTUNITIES

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WBU-ISOG Meeting

Tunis 2-3 November 2010

Arab States Broadcasting Union
League of Arab States

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CHALLENGES AND OPPORTUNITIES

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- Television landscape in the Middle East and North Africa has witnessed a significant progress and a very fast growth rate during the last decade, fueled by strong population growth and socio-economic development.

- The Arab region with over 300 million inhabitants and a young population, with increasingly discerning and rapidly evolving TV preferences, has strong demand and consumption for TV broadcasting services.

- To address this challenging media landscape, growing TV channels have been targeting the whole Arabic speaking population

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- **733 TV Channels are broadcast (2010) :**
  - **470 organizations : 26 public / 444 private**
  - **124 Public / 609 Private TV channels**
  - **591 Free–to-Air / 142 Pay TV channels**
  - **Through Arabsat, Nilesat and Noursat**

- **All Arab satellites are expanding in capacity and geographic coverage**

- **Satellite TV is widely available in the Arab region, with very high level of penetration**

- **Satellite TV is accessible today by most households at no running cost through the simple acquisition of a satellite dish and a set-top-box.**

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ARABSAT

- Founded in 1976 by the 21 member-states of the Arab League
- Arabsat Satellites carriy over 340 TV channels and 160 Radio stations, reaching tens of millions of homes in over 100 countries across the Middle East, Africa, Europe and Central Asia.
- Arabsat operates 4 satellites from two orbital positions 26 deg E and 30.5 deg E
- These satellites operate in C, KU and KU-extended bands
- A new satellite will be launched in 2011 at 20 deg E

NILESAT

- Nilesat is an investment Egyptian Company established in July 1996,
- Through its 2+ satellite constellation it is broadcasting 452 TV channels and 104 Radio channels.
- 76% of the TV channels are free to air. The others are encrypted
- They cover entertainment, thematic distance learning, business and stock exchange services

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NOORSAT

- Noorsat was incorporated in Bahrain in December 2004
- Privately owned company with head office in Amman, Jordan,
- NOORSAT currently leases satellite capacities from other operators at orbital positions 25.5 E, 7 deg W, 8 W, 4 E and 85 degrees E
- 200 TV and radio channels are transmitted serving audience from East Asia, Middle East, and North Africa

YAHSAT

- Yah Satellite Communications Company incorporated in 2007
- A private joint stock company fully owned by Mubadala, an investment arm of the UAE government
- Yahsat formed a joint company with SES Astra, YAHLIVE, to operate its DTH services
- Satellite will be launched in the first half of 2011 and will only be dedicated to HD channels

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QATARSAT (SUHAILSAT?)

- A joint venture between Qatar and Eutelsat
- Expected to be launched in 2013 and positioned at 25.5 deg E
- It will replace the current Eurobird 2 at the same orbital position
- It will have Ku band transponders and will also initiate Ka band capacity for expanded services

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ASBU / ARABSAT Global bouquet

- Arab Broadcasters used in the past different satellite platforms to reach the same markets, causing a problem to audience and high cost
- Service was launched by Arab states broadcasting Union an Arabsat in 2004
- Intended to provide Arab TV and Radio channels in one bouquet to reach Arab audiences globally at reasonable cost
- Service is offered with Globecast cooperation and through distribution over six most widely reaching satellites
- The bouquet(s) deliver now 16 TV channels and 26 radio channels to Arabic speaking and expatriates viewers and listeners throughout all continents.

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Audi-Visual Media Regulations in the Arab Region

- Most satellite channels in the Arab region operate from free-zone Media cities in Dubai, Egypt and Jordan with no published governance for their operation
- A lot of satellite channels content is not acceptable morally and socially, in particular on Eutelsat Hotbird
- An attempt was made to agree on a pan-Arab content code for satellite channels, but was finally treated as voluntary guidelines
- Audi-visual Media regulations for private channels are rarely found in the Arab countries with some exceptions
- Some Arab countries started to put in place a legislative framework for privately-owned TV and Radio channels licensing within its boundaries
- Emergence of new media and services offered on telecom platforms are making legistlation a necessity

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Digital Terrestrial Television (DTT)

● Digital Terrestrial Television (DTT) is still not available in many countries of region

● There is no set plan to switch off analog TV, although RRC-06 called for no protection of this service after 2015.

● Kingdom of Saudi Arabia, Morocco and Tunisia, and Algeria have already launched DTT with coverage ranging from 50% to 90% of population

● Limited financial resources, lack of regulatory framework, high competition from Free-to-Air satellite TV and the lack of attractive TV content are the main challenges facing the introduction of DTT in the region

Cable TV

●Low penetration level in the Arab region and a number of telecom operators started IPTV following broadband developments (mostly in the United Arab Emirates0

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High Definition Television

- High definition television transition is underway and spreading throughout the Arab world with varying degrees, depending largely on, clear vision, availability of financial resources and existing infrastructures

- Very few broadcasters started transmitting in HD, all on satellite and mostly privately-owned TV channels

- All new TV production facilities and OB vans are being built in HD

- The Arab HDTV Group was established in 2007 to address the introduction of HDTV in the region, but this is the subject of another presentation !

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Thank you for your attention

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